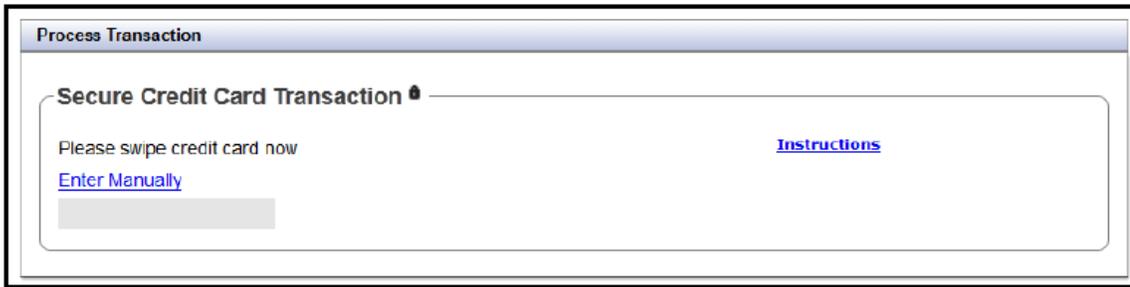


Office Ally now offers Credit Card and eCheck processing. Streamline your operations with great rates from Revenue Maximize. Simply contact AxiaMed at (855) 376-2942 ext. 633 for a statement analysis and quote. Make sure to mention that you're an Office Ally user.

## CREDIT CARD PROCESSING

1. Log in to [www.officeally.com](http://www.officeally.com).
2. In the **Service Center**, click the **Process Credit Card Transaction** link.
3. If you are a merchant account member, you will get the option to swipe the credit card or manually enter the credit card information for the transaction.



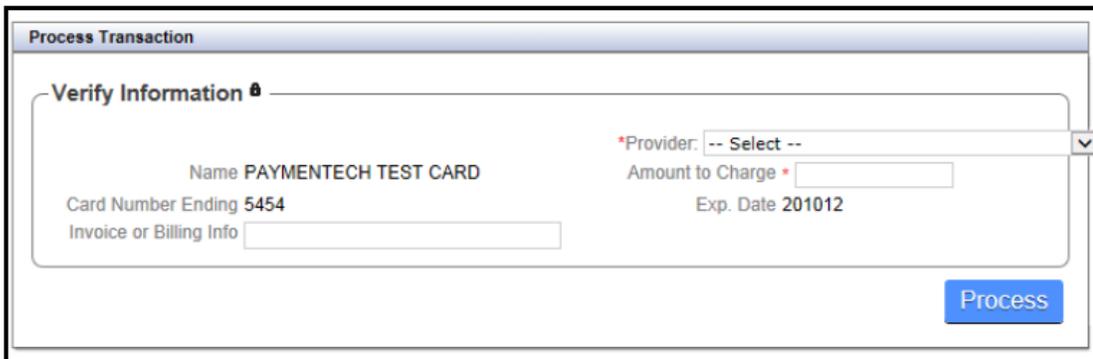
**Process Transaction**

**Secure Credit Card Transaction**

Please swipe credit card now [Instructions](#)

[Enter Manually](#)

4. If you choose to swipe the credit card, the following information will display:
  - Cardholder Name
  - Last 4 digits of Card Number
  - Expiration Date
5. If you have multiple merchant accounts for your practice, you will see a drop down list to select the correct merchant to apply the payment to.
6. Once you select the **Provider**, enter the **Amount to Charge** and the **Invoice or Billing Info** (if applicable).



**Process Transaction**

**Verify Information**

Name PAYMENTECH TEST CARD

Card Number Ending 5454

Invoice or Billing Info

\*Provider: -- Select --

Amount to Charge

Exp. Date 201012

**Process**

7. Click **Process**.

8. If you choose to enter the credit card information manually, all fields with an \*Asterisk are required.

**Process Transaction**

**Secure Credit Card Transaction**

Name \*  Card \*  [CCV](#) \*

Address \*  Card Number

City \*  Expires \* January \* 2015

Zip Code \*  Amount: \*

Comments:

[Verify Information](#)

9. If you have multiple merchant accounts for your practice, you will see a drop down list to select the correct merchant to apply the payment to.

10. Click **Verify Information**. This will allow you to verify that all the information entered is correct.

**Process Transaction**

**Verify Information**

Name JOHN SMITH Card Number Ending 5555

Address 1234 MAIN STREET CCV 555

City VANCOUVER Exp. Date 201811

Zip Code 98687

Comments Amount

\$50.00

[Edit Information](#) [Process](#)

11. If you need to make a change, click **Edit Information**.

12. Regardless if you swiped the card or entered the card information manually, you can now proceed to the next step and process the payment.

13. After you click **Process**, a confirmation screen will appear.

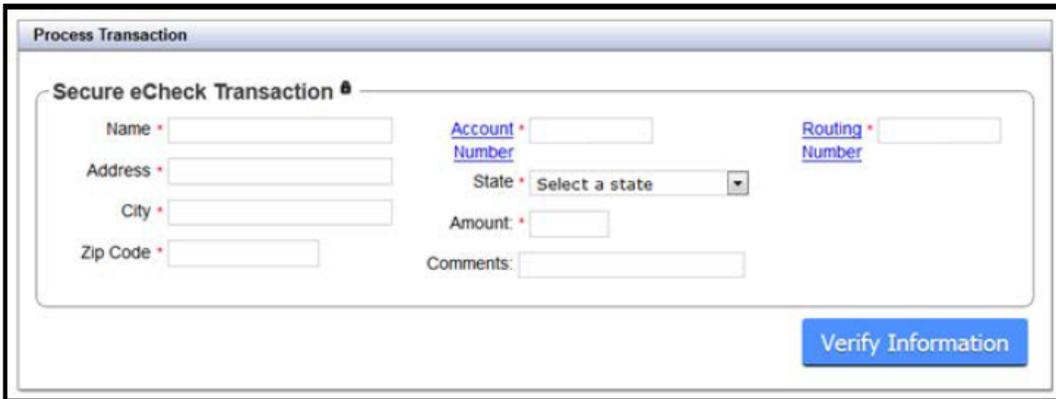
Transaction has been processed successfully. Approved for \$50.00

[OK](#)

14. If the card could not be processed, a message will appear in the **Verify Information** screen letting you know what the issue was.

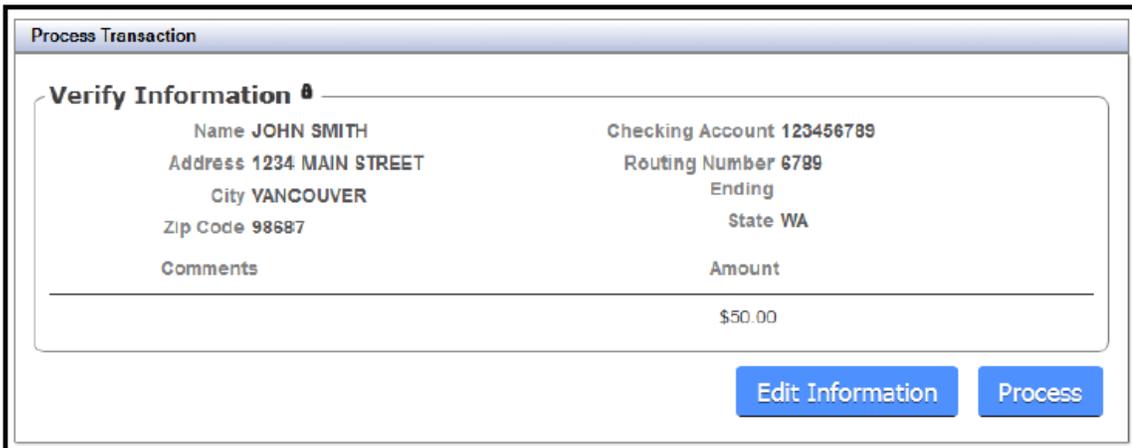
## E-CHECK PROCESS

1. Log in to [www.officeally.com](http://www.officeally.com).
2. In the **Service Center**, click the **Process eCheck Transaction** link.
3. All fields with an \*Asterisk are required.



The screenshot shows a web form titled "Process Transaction" with a sub-section "Secure eCheck Transaction". The form contains several input fields: "Name", "Address", "City", "Zip Code", "Account Number", "Routing Number", "State" (a dropdown menu), "Amount", and "Comments". Each field has an asterisk indicating it is required. A blue button labeled "Verify Information" is located at the bottom right of the form.

4. If you have multiple merchant accounts for your practice, you will see a drop down list to select the correct merchant to apply the payment to.
5. Click **Verify Information**. This will allow you to verify that all the information entered is correct.

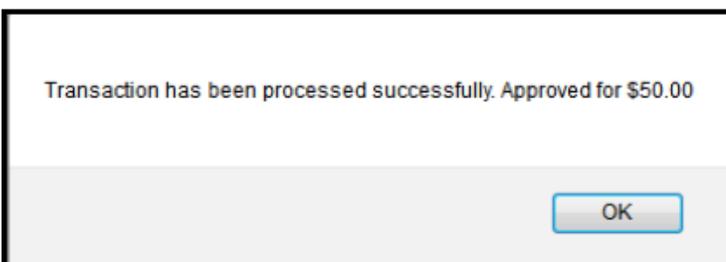


The screenshot shows a web form titled "Process Transaction" with a sub-section "Verify Information". The form displays the following information:

Name JOHN SMITH	Checking Account 123456789
Address 1234 MAIN STREET	Routing Number 6789
City VANCOUVER	Ending
Zip Code 98687	State WA
Comments	Amount
	\$50.00

At the bottom right, there are two blue buttons: "Edit Information" and "Process".

6. If you need to make a change, click **Edit Information**.
7. After you click **Process**, a confirmation screen will appear.



The screenshot shows a confirmation message: "Transaction has been processed successfully. Approved for \$50.00". Below the message is a blue button labeled "OK".

## VIEWING PAST CREDIT CARD & E-CHECK TRANSACTIONS

Within Office Ally, you have the ability to view the last 100 Credit Card and eCheck transactions. You will be taken to this section automatically after each successful transaction. To access this section without processing a payment first, you can click the **Process Credit Card Transaction** or **Process eCheck Transaction** link and you will see a link to the **Last 100 Transactions**.

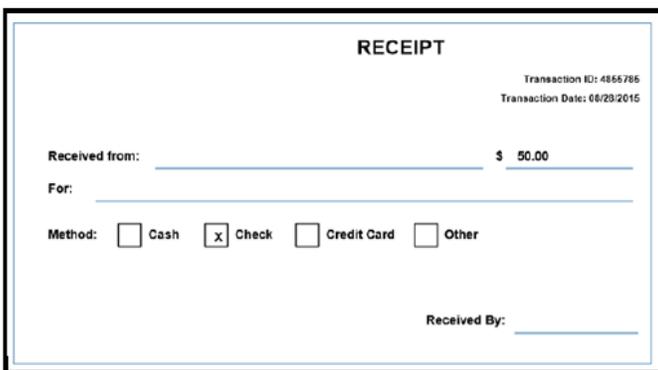
## PRINTING A RECEIPT

1. From the **Credit Card Transactions List** (Last 100 Transactions), click on the **Printer Icon** in the Receipt column.



Date	Name	Amount	Auth.No	Comments	Trans.Type	Provider	Type	Receipt	Void / Refund
08/28/2015		\$50.00	1025891		Purchase		eCheck		
08/28/2015		\$50.00	123456		Purchase		Credit Card		

2. A second window will open with a copy of the receipt. From here, you can print.



**RECEIPT**

Transaction ID: 4856786  
Transaction Date: 08/28/2015

Received from: \_\_\_\_\_ \$ 50.00

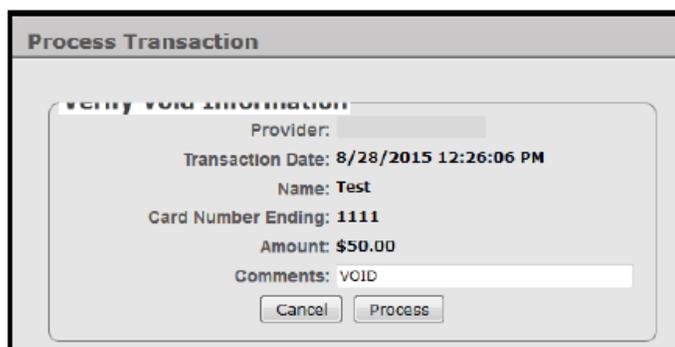
For: \_\_\_\_\_

Method:  Cash  Check  Credit Card  Other

Received By: \_\_\_\_\_

## VOIDS & REFUNDS

1. From the **Credit Card Transactions List** (Last 100 Transactions), click on the **Void/Refund** icon next to the transaction that you would like to void or refund. **NOTE:** a payment will be voided if the payment has not been completely processed by the bank. If the payment has been completely processed by the bank, the payment will be refunded.



**Process Transaction**

**Verify void information**

Provider: \_\_\_\_\_

Transaction Date: 8/28/2015 12:26:06 PM

Name: Test

Card Number Ending: 1111

Amount: \$50.00

Comments: VOID

2. Enter a comment (if applicable) and then click Process. A confirmation screen will appear once the void/refund is processed.